

Information and Referral Form

Purpose of the Information and Referral Form:

- To do a basic assessment of client's employment needs
- To gather information to refer to appropriate employment services
- To keep a record of where clients were referred to for follow up

Directions:

1. Meet and greet the client. Make sure that you are both comfortable. Ask open questions to encourage conversation.
2. Review client's eligibility to work in Canada. Keep in mind some programs have specific eligibility criteria.
3. Establish expectations. Provide an overview of your role as a settlement worker. Help the clients understand the difference between settlement and employment services to avoid misunderstandings and to set the positive tones for referral.
4. Make note of the language proficiency of the client from your own observation. Ask about additional languages they may have that can also lead to employment.
5. Use this form to ask some key questions around employment needs to gather information and make the appropriate referral. You don't have to use all the questions. Select those you think are appropriate. Use the table at the end of the form to make note of the client's needs.
6. Summarize the conversation. Fill in the Referral Form and give it to the client. Keep the chain of referral as simple as possible. Ask client if he/she has any questions.
7. Let the client know if you will be following up with him/her. Based on the action plan and relationship with employment service providers, you may also be able to follow up directly with employment services.
8. Thank the client for his/her time. Accompany client to main lobby.

Information and Referral Form

Name: _____

Contact Information: _____

General Questions to Open Dialogue

1. What brought you in today?
2. What are you looking for?
3. How did you get to know about our service?

Informal Language Assessment

English

Basic ☐

Intermediate ☐

Advanced ☐

French

Basic ☐

Intermediate ☐

Advanced ☐

Other Languages: _____

What Gaps Need to be Addressed?

Put a check mark next to the employment needs that need to be addressed and discuss the gaps with client.

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Language	Career Decision-Making	Skills Enhancement
Needs language assessment <input type="checkbox"/>	Has defined employment goal <input type="checkbox"/>	Credentials are assessed <input type="checkbox"/>
Needs language training <input type="checkbox"/>	Needs to define goal <input type="checkbox"/>	Needs credential assessment <input type="checkbox"/>
	Has researched occupation <input type="checkbox"/>	Needs skills training <input type="checkbox"/>
	Needs to research occupation <input type="checkbox"/>	Needs language training <input type="checkbox"/>
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Job Search	Job Maintenance	Other Settlement Issues
Knows how to search for a job <input type="checkbox"/>	Has difficulty maintaining a job <input type="checkbox"/>	Child care <input type="checkbox"/>
Needs to learn job search techniques <input type="checkbox"/>	Needs soft skills enhancement <input type="checkbox"/>	Transportation <input type="checkbox"/>
		Family <input type="checkbox"/>
		Depression / Mental Health <input type="checkbox"/>
		Housing <input type="checkbox"/>
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Information and Referral Form

Name: _____ Date: _____

Internal Referrals

Contact: _____

Date of appointment: _____

Time: _____

Purpose:

External Referrals

Contact: _____

Agency: _____

Date of appointment: _____

Time: _____

Purpose:

Notes:

External Referrals

Contact: _____

Agency: _____

Date of appointment: _____

Time: _____

Purpose: